

SIS2000+ Training Manual

Mass Scheduling

Adding and Modifying Course Requests

Using the Course Requests Editor

Pre-Requisites

Courses must have been defined through the District Courses Editor. To use those courses to add Course Requests, those courses must be selected for the 'target' track and students must be assigned to that track. To select courses for a track, refer to the Course Selection Editor. Use the Student Editor to assign students to tracks, making sure that their status for a next-year track is 'Future'.

Purpose

Course Requests are entered for each student before they can be scheduled into a Course. Through the Course Requests Editor, you can view Course Requests that were generated through Career Plans, generate Career Plan Requests on a per student basis, add Course or Team Requests on a per student basis, and edit or modify all Course and Team Requests.

Requests may be generated in a variety of ways. To generate Requests for a group of students use the Career Plan Editor. To generate Requests for an individual student use either the Course Request Editor (for Next-Year Mass Scheduling preparation) or the Student Schedule Editor (for individual scheduling purposes).

Training Objectives

View Existing Course Requests
Add Course, Team, and Group Requests
Generate Career Plan Requests
Edit / Delete Requests

Launch the Course Requests Editor

From the Scheduling Menu, click on **Course Requests**.

The opening screen will default to the first active student in the current track that you logged in to.

View Existing Course Requests

Select a student to view using the **VCR buttons** or the **List** or **Find** features.

If you are working on Course Requests that apply to your next-year track(s), you will have to go to the banner and select to view Future Students.

Screen Layout

The Course and Team Requests that have been generated through the Career Plan Editor, or through a previous session of the Course Request Editor or Student Schedule Editor, are displayed on this screen as line entries with the following data fields. (This is a read-only screen. Editing and adding of Requests will be done on another screen from within this application.)

Coffee Demo High School - Course Request Editor

File Sort Help Date: 05/27/98

Student Name: Abbott, Lindsay P [15000001] M/F: F Birthdate: 09/22/1981 Age: 16 Grade: 10 Group: Current

Track/School/Year: T 0195 1997/98 Advisor: Unassigned, Entry: 09/26/97 Exit:

T	Code / Description	Lock	Faculty	Lk	Ex	Term	Lk	Ex	Alt For	Prio
C	00.000 -- Home Room									0
C	23.062 7 -- LIT/CM									1
C	23.462 7 -- LIT/CM									0
C	26.412 -- BIOLOGY									1
C	27.461 -- ALGEBRA					Semester 1	Y			0
C	27.463 -- GEOMETR	Y	Ardis, Charlene [150000]						27.461 -- ALG	1
C	45.483 7 -- WOR H		Arnold, Lee Ann [150000]	Y						0
C	60.471 -- SPANISH 1									0

Navigation buttons: Find, List, Delete, Edit, Add, Save, Quit

Callout: View Future Students

Course Request Editor summary screen.

T (Type) - displays a code for the type of course, as follows:

?? **C (Course)** - a single course (as defined in the District Courses database).

?? **T (Team)** - the Team the Schedule Loader will attempt to schedule a student's requests into (as defined in the Team Editor program).

Code / Description - the Course or Team ID number, followed by the name of the Course or Team.

NOTE: If you see the words "<Invalid Course>" in this field it is likely that a Course has been de-selected from a track or it is no longer 'Active' in the District Courses Editor. Delete that Request, make any necessary changes, and add it again.

Lock – whether this Request is Locked or Unlocked. Requests entered through this module default as Locked Requests. Career Plan Generated Requests default as Unlocked Requests. This designation comes into play when deciding which Requests to clear, if any, when generating Requests through Career Plans.

?? **"Y"** = Locked.

?? An **empty field** indicates Unlocked.

Faculty – the name of the Faculty Member that is associated with the selected Request.

?? **LK (Faculty Member is Locked)** – the Loader should attempt TO schedule the student with this Faculty Member for this Request.

?? **EX (Excluded)** – the Loader should attempt to **NOT** schedule the student into any of this Faculty Member's sections of this Course.

?? **"Y"** – in one field or the other (LK or EX) represents the choice that was made regarding a Faculty Member. An empty field indicates that NO preference was indicated.

Term – the scheduling Term that is associated with the selected Request.

?? **LK (Term Selection is Locked)** – the Loader should attempt TO schedule the student in this course during the selected Term.

?? **EX (Excluded)** – the Loader should attempt to **NOT** schedule the student into the selected Request during the specified term.

?? **"Y"** – in one field or the other (LK or EX) represents the choice that was made regarding the Term selection. An empty field indicates that NO preference was indicated.

Alternate for - the name of the Request that this Course is an alternate for, if applicable.

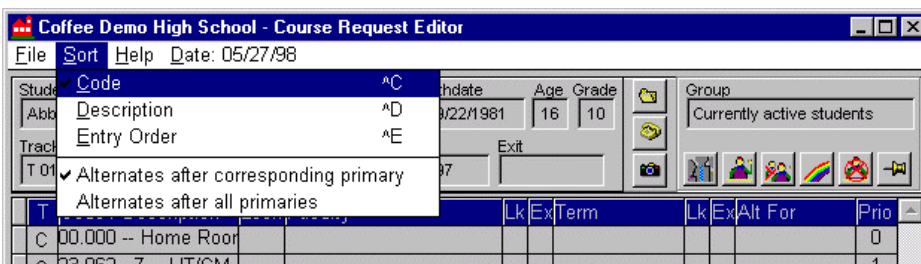
Prio (Priority) – the priority of this Request in relation to the other Requests.

?? The Loader program will schedule requests with highest priority first. The Loader will accept priority values ranging from 1-999, with "1" being the highest priority. The priority system is used when automatically building a schedule to ensure that the students who need a specific Course the most are the first ones to be scheduled into the class. The default for this field is "1". Entering a zero (0) would be interpreted by the Loader as "1000", or lowest priority.

View Options

If you prefer to view your student's Course Requests in a different manner, there are a few Sort Options for you to choose from.

From the top of the Course Requests screen, on the menu bar, open the Sort Options menu by clicking on the word **Sort**.



Course Request Editor Sort Menu.

Primary Requests

The default Sort Order is by Course **Code**, which means that Requests are listed in numerical order, by Course Code Number.

You can change the Sort Order to view by **Description**, which lists the Requests in alphabetical order by Course Description.

Or you may choose to view Requests by the order that they were entered into the system by selecting **Entry Order**.

Alternate Requests

The default Sort Order for Alternate Requests is **Alternates after corresponding primary**, which means that Alternate Requests are immediately following their corresponding Primary Requests, based on the Sort Order selected above.

If you prefer to view all of your Primary Courses, with all Alternates at the bottom of a student's list of Requests, select Alternates after all primaries, and Alternates will not immediately follow their corresponding Primary Requests. No matter what order you sort your Primary Requests in, your Alternates will always remain at the bottom of the list.

Adding Course Requests

To add a Course Request for a student, click **Add** from the bottom of the screen. The summary screen will turn into the Add/Edit screen.

Coffee Demo High School - Course Request Editor
File Sort Help Date: 05/27/98

Student Name	M/F	Birthdate	Age	Grade
Abbott, Lindsay P [15000001]	F	09/22/1981	16	10
Track/School/Year	Advisor	Entry	Exit	
T 0195 1997/98	Unassigned,	09/26/97		

Group: Currently active students

Add Course Request

Type: Course Code: 07.121 Description: 07.121 -- FINANCE

Faculty: Arnold, Lee Ann [15000003]

Priority: 1 Lock Request

Alternate For:

Term: Semester 1

Status: New request/not attend

Schedule with this faculty
Do not schedule with this faculty

Faculty Selection Must Be Honored

Use only this term
Exclude this term

Term Selection Must Be Honored

Add Another

Print Find List Delete Undo Add Save Quit

Course Request Editor Add/Edit Screen where selections/changes are made for all Requests.

When the screen opens, the only 'active' (editable) field will be **Type**. Once a type is selected, the other fields will become activated.

Select the **Type** and enter the **Code** (or select the course from the **Description** drop-down box).

NOTE: Only Courses that have been assigned to the track you are working on will show as possible Course Request choices. If a Course you are looking for is not showing in the Description drop-down box, it will need to be selected for the proper track via the **Course Selection Editor**.

These are the only fields that are REQUIRED. All of the other fields are OPTIONAL selections that you may set as parameters for the Schedule Loader program.

You may now click **Save** to finish Adding this Request, or continue with setting the Loader parameters for this Request.

TA – check this box if the student is requesting to be a Teacher's Assistant for this Course.

Faculty – select the Faculty Member associated with this Request, and then select to schedule or not to schedule the student with this Faculty Member.

?? **Faculty Selection Must Be Honored** - every attempt will be made by the Student Loader to schedule the course with the Faculty preference (or exclusion). Check this field if the faculty preference is required as a condition for scheduling the student in the course.

Priority – type in the scheduling priority of this Request (see above for numbering system used by the Loader. "1" will be the default.

Lock Request – when checked-off (which is the default) Requests will be designated as Locked.

Alternate For – select the Course that this Request is an alternate for (see [Alternates](#) section below for more details.)

Status – this is a read-only field displaying the Loader's scheduling status of this Request.

Term – select the Term associated with this Request, and then select to schedule or not to schedule this Course during the selected Term.

?? **Term Selection Must Be Honored** - every attempt will be made by the Student Loader to schedule the course with the Term preference (or exclusion). Check this field if the Term preference is required as a condition for scheduling the student in the course.

Save or Add Another Course Request

Click on the **Save** command button to post the Course Request to the database and exit the Add/Edit screen, or **Undo** to cancel. Click on the **Add Another** command button to automatically save the current request and open a new Course Request Add/Edit screen. Repeat the above steps to add another Request.

Shortcut for Rapid Entry

If you have a long list of Course Requests to enter and you do not need to define attributes at this time, click on **Add** from the main summary screen to begin the Rapid Entry process.

Simply enter **"C"** in the **Type** field to designate the Course type selection. Then press **TAB** to move the focus to the **Code** field (or TAB twice to go to the **Description** field if you do not know the code). Type in a valid course ID code (or select the Description) and press **ENTER**. Pressing ENTER will cause the Request to be saved and the **Add Another** button to be automatically pressed. A new Add/Edit screen will open with the focus already on the Type field, ready for you to repeat the rapid entry steps for each Request you want to add. Click **Save** (or **Done**) after you enter the last rapidly entered Request.

Alternates

If the Request you are adding is an **Alternate For** another Course in the student's list of Course Requests, go to the **Alternate For** field while you are setting the parameters for the Request and select the corresponding PRIMARY Request from the list.

The choices in this list are the Primary Requests that have already been entered for a student. Courses are considered to be Primary Requests unless the Alternate For field has been used to designate otherwise. A Primary Request must be entered before an Alternate for it can be entered.

Adding Team Requests

You may also enter Team Requests through the Course Request Editor. Teams are added in the same manner as Courses.

Click on **Add** from the bottom of the summary screen. An Add/Edit screen will appear.

In the **Type** field, select "Team". Enter the **Code** of the Team or select it from the **Description** drop-down box. These will be the only fields you can select. The other parameters are not used when making Team Requests.

NOTE: you can not just enter a Team request with no Courses Requests. When teams are created, they are not tied to specific courses. That is why **you must add BOTH the Course Requests and a Team Request**. Teams are tied to students by adding a Team Request in the Course Request Editor and they are linked to teachers in the Master Schedule.

Team Requests will display with a 'T' in the 'Type' column on the Course Request summary screen.

The screenshot shows a software window titled "Coffee Demo High School - Course Request Editor". The window has a menu bar with "File", "Sort", "Help", and "Date: 05/27/98". Below the menu bar is a form with several fields. The "Student Name" field contains "Abbott, Lindsay P [15000001]". The "M/F" field contains "F", "Birthdate" contains "09/22/1981", "Age" contains "16", and "Grade" contains "10". The "Track/School/Year" field contains "T 0195 1997/98", "Advisor" contains "Unassigned", "Entry" contains "09/26/97", and "Exit" is empty. To the right of these fields is a "Group" dropdown menu with "Currently active students" selected. Below these fields is a section titled "Add Course Request". It contains a "Type:" dropdown menu with "Team" selected, a "Code:" text field with "HG" entered, and a "Description:" dropdown menu with "HG -- Honors Group" selected. Below these is a checkbox labeled "T/A" which is unchecked. At the bottom left is a "Faculty:" dropdown menu. At the bottom right are two radio buttons: "Schedule with this faculty" (which is selected) and "Do not schedule with this faculty".

Course Request Editor Add/Edit screen showing a Team Request being added.

Adding Group Requests

Groups of related courses are defined in the Group Editor application and given a group name. By selecting a Group name in the Add Course Request procedure, all of the component courses within the Group will added to the student's Course Request list simultaneously (bulk-assigned).

Click **Add** from the bottom of the main summary screen.

Select "Group" in the **Type** field. The Add/Edit screen will become modified so that Group selections may be made.

The screenshot shows the 'Coffee Demo High School - Course Request Editor' window. The title bar includes the application name and standard window controls. The menu bar has 'File', 'Sort', 'Help', and 'Date: 05/26/98'. The form is divided into several sections. At the top, there are fields for 'Student Name' (Abbott, Lindsay P [15000001]), 'M/F' (F), 'Birthdate' (09/22/1981), 'Age' (16), and 'Grade' (10). Below these are 'Track/School/Year' (T 0195 1997/98), 'Advisor' (Unassigned), 'Entry' (09/26/97), and 'Exit'. To the right, there's a 'Group' dropdown set to 'Currently active students' and a toolbar with icons. The main section is titled 'Add Course Request'. It contains a 'Type' dropdown set to 'Group', a 'Description' field, and a 'Courses in Group' dropdown which is highlighted with a red box. A 'Change Group' button is also highlighted with a red box. Other fields include 'Faculty', 'Priority' (1), 'Lock Request' (checked), 'Alternate For', 'Term', 'Status' (New request/not alter), 'Schedule with this faculty' (radio button), 'Do not schedule with this faculty' (radio button), 'Faculty Selection Must Be Honored' (checkbox), 'Use only this term' (radio button), 'Exclude this term' (radio button), and 'Term Selection Must Be Honored' (checkbox). At the bottom left of the form area is an 'Add Another' button. The bottom of the window has a toolbar with buttons for 'Print', 'Find', 'List', 'Delete', 'Undo', 'Add', 'Save', 'Quit', and navigation arrows.

Add/Edit screen after Group has been selected in the Type field.

Click on **Change Group**. This will launch the Group Editor. At this point you may create a new Group of Courses if an appropriate one does not yet exist, or you can make a selection from your existing list of Course Groups by highlighting the Group you wish to add and clicking on **Select**.

After you click Select, the Code and Description of the Group will automatically appear in those fields.

Whenever Group Type is selected, the **Courses in Group** field will appear. Click on the field button to view a drop-down list if you wish to view the courses in the selected group.

You may also change the priority level for these Requests at this time and/or designate whether or not they should be Locked Requests.

NOTE: Most of the data fields (such as Faculty, Alternate For, Term, etc.) in the Group Request dialog are disabled during this step because they refer to attributes of individual courses only. After the Courses in the group are posted to the Course Request list via the Save command, their individual attributes may be entered by using the edit mode.

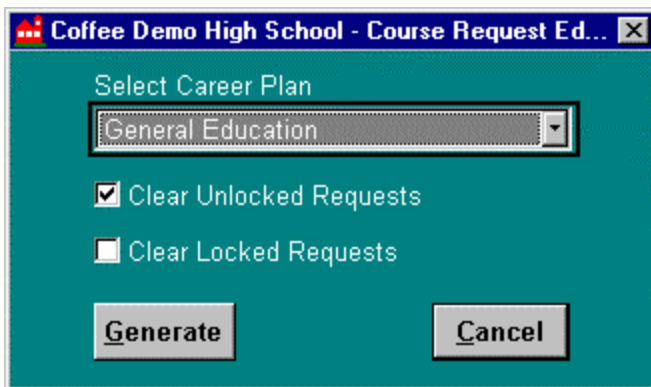
Click **Save** when you are ready to add all of the Courses in the Group to the student's list of Course Requests. The Courses will be displayed individually on the main summary screen, with a Type of "C", because they have automatically been converted into Course Requests.

Each Course may now be edited individually if you wish to set Loader parameters for them.

Adding Career-Plan-Defined Requests

Course Requests may also be generated for individual students in the Course Request Editor based on the Career Plans that were defined in the Career Plan Editor. For more information on Career Plan, please refer to that documentation.

To generate Career Plan Requests from the Course Request Editor, go to the **File menu** and select "**Generate Course Requests**". The Career Plan selection window will be displayed.



Career Plan selection window from within the Course Request Editor.

Select the Career Plan from which you want to generate Course Requests. Remember that this will only generate Requests for the selected student.

Select which type of Requests (Locked, Unlocked, both, or neither) you want to clear when you run the generation process.

Click on **Generate** to begin, or **Cancel** to abort.

The process will run, and a message box will display how many Requests were entered. Click **OK** and you can view the Course Requests on the main summary screen and edit them individually if you please.

NOTE: Only Career Plan Requests that match a student's Grade Level will be Added through the generation process. Also, only Courses in a Career Plan that have been assigned to your target track will be added.

Editing Course Requests

Select the Request you want to Edit. A selected Request will be outlined in blue and will have a small black arrow next to the 'Type' column on the summary screen.

Click on the **Edit** button at the bottom of the screen. The Add/Edit screen will appear. Make the necessary changes to the Request and click **Save** when you are done.

The screenshot shows the 'Coffee Demo High School - Course Request Editor' window. The title bar includes 'File', 'Sort', 'Help', and 'Date: 05/26/98'. The main form is titled 'Edit Course Request'. It contains several input fields and checkboxes:

- Student Name:** Abbott, Lindsay P [15000001]
- M/F:** F
- Birthdate:** 09/22/1981
- Age:** 16
- Grade:** 10
- Group:** Currently active students
- Track/School/Year:** T 0195 1997/98
- Advisor:** Unassigned,
- Entry:** 09/26/97
- Exit:**

The 'Edit Course Request' section includes:

- Type:** Course (selected in a dropdown menu)
- Code:** 23.462 7
- Description:** 23.462 7 -- LIT/CM 10
- ☐ T/A
- Faculty:** (dropdown menu)
- ☒ Schedule with this faculty
- ☐ Do not schedule with this faculty
- ☐ Faculty Selection Must Be Honored
- Priority:** (input field)
- ☐ Lock Request
- Status:** Primary request sche
- Alternate For:** (dropdown menu)
- ☒ Use only this term
- ☐ Exclude this term
- ☐ Term Selection Must Be Honored
- Term:** (dropdown menu)

At the bottom of the form, there are two navigation buttons (left and right arrows) circled in red. Below the form is a row of buttons: Print, Find, List, Delete, Done, Add, Save, and Quit.

Course Request Editor Add/Edit Screen in Edit mode.

NOTE: Before you Edit any parameters for a Request, you can scroll through a student's Requests with the **VCR buttons** that appear in the Add/Edit screen.

Deleting Course Requests

Select the Request you want to Delete. A selected Request will be outlined in blue and will have a small black arrow next to the 'Type' column on the summary screen.

Click on the **Delete** button at the bottom of the screen. You will be prompted to confirm your selection. Make the appropriate choice and you will be returned to the main summary screen.

NOTE: If you Delete a Course that is the Primary Request for an Alternate, the Alternate Course will display the words "<can't find>" in its Alternate For field. The system can no longer find the Primary because it has been deleted. Either Delete the Alternate at this time as well, or edit it and change the Primary selection in the Alternate For field.

What's Next?

Viewing Course Requests and Using Reports

The next step is to verify that Course Requests were entered properly. There are several Scheduling Reports that can help you in this process.

- ?? The **Course Request List and Tally** will give you a listing of all the Courses that have been requested with a total number of Requests listed for each Course.
- ?? The **Student Course Request List** can be used to print out selected students' Course Requests or to print out an Exceptions Listing of students who may have problems with their Requests. Problems may include exceptions due to gender, grade level, too few Requests, or too many Requests.

Editing Course Requests

Changes may still need to be made to Course Requests at this time.

- ?? You can re-generate Course Requests through the **Career Plan Editor**.
- ?? You can make changes to Requests on a student-by-student basis through the **Course Requests Editor**.
- ?? Or, you can make changes to several students at the same time with the **Mass Request Changes** application.

Building a Master Schedule

If a Master Schedule has not yet been defined, you can use the **Course Request List and Tally** and **Conflict Matrix Reports** as tools in creating a **Master Schedule** for your track(s). The Loader can not be run, and students can not be scheduled into their Requests, until a Master Schedule has been defined. Refer to that documentation for more details.

Scheduling Students

If you have a Master Schedule, your Course Requests look good, and you are done editing / modifying them, you can move on to the **Student Schedule Editor** to Schedule students one at a time. Or, you can go to the Loader and let SchoolNet automatically schedule students into their requested courses based on the rules and parameters you defined.